Electronic Case File / Web Base CARES Interface

Project Scope

The project will include the implementation of an Electronic Case File function that will capture via on site image scanning of CARES case supporting documentation for storage in a central document repository. Images will be indexed using a structure that provides support of business requirements of the Economic Support Offices around the state.

The project will include some functionality for Optical Character Recognition with population of the data into the CARES database.

CARES client registration and application entry screens will be converted to a Web based platform.

Major Components

Content Manager – IBM image storage & retrieval software package

Ascent Capture - Kofax image scanning (capture), indexing, processing

CARES Worker Web - Conversion of CARES Client Registration / Application Entry screens to Web based screens

CARES Self Service Web Functions

Central Processing - BadgerCare & Food Stamp Applications, Six Month Interim Report Forms
- Implement scanning of applications & case management at the Central Application Processing Office (CAPO)

Electronic Case File Capabilities
Development of the Electronic Case File (Content Manager & Ascent Capture) will be simultaneous with development of CARES Web screens.

Implementation may happen together or separately depending on progress of development.

Time Frame - Pilot Rollout July 2004

Pilot Counties will be Dane and others (TBD)

Security - Web Access Management System (WAMS)

One security I.D., state wide across all systems, for public clients and state personnel

Image Access - access to case related images from three pathways

ES Worker in the course of working a CARES case
Index of case or pin & associated CARES screen ID.
Authorized personnel may review create copy of images
Index of folder grouping

Client may use web access to view their document images.
Index of case, pin, folder grouping

Contemplated Image Storage Index

Case / Screen ID ---------------------- |
|
PIN / Screen ID ---------------------- |
| --- Document Item
Case / Folder Grouping ------------- |
|
PIN / Folder Grouping -------------- |

Typical Image Folder Contents

Assets

Annuity Contracts
Asset Assessment & packet
All Funeral / Burial Trust forms (casket, vaults, lots, etc)
Burial Insurance (LIFBC)
Life Insurance policy (term, group, whole)
Life Estate legal documents
Divestment packet (note: ASS, Divest, date)
Bank Statements
Bank Inquiries
Brokerage Inquiries
Property Tax Bill or Assessment
check stubs
Income Statements
Credit Union Statements
Finance institution statements & printouts
Social Security Income Statements
Vehicle Documentation